

PENTZ FEATURED ON FORBES BEST-IN-STATE NEXT-GEN LIST



Erin Pentz, CCO and Wealth Advisor

Indianapolis, IN (October 2019) – SBC Wealth Management is proud to announce Erin Pentz was recently named to the *Forbes* Best-in-State Next-Gen Wealth Advisors list. This recognition features the nation's top next-gen advisors in the wealth management industry. Erin was ranked 11th in the state of Indiana and this is her third year in a row of receiving this prestigious recognition from *Forbes*.

Scott Holley CEO, stated, "SBC Wealth Management is extremely fortunate to have Erin as one of our owners and senior advisors. She prides herself in making sure the needs of the client are met first and always looks out in their best interest. We are extremely proud of Erin on receiving this honor."

SBC Wealth Management is a Securities Exchange Commission Registered Investment Advisor located in Indianapolis, Indiana. Founded in 1983, SBC Wealth Management was founded on the American values of hard work, integrity, and uncompromising quality and personal service. SBC's mission is to serve as their client's financial compass with first class service as the cornerstone of the business. SBC's clients rely on them to create, enhance and preserve their lifestyles.

The *Forbes* Next-Gen Wealth Advisors rankings, developed by SHOOK Research, is based on an algorithm of qualitative criterion, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK receive a fee in exchange for rankings.

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